



**Commonwealth of Massachusetts**  
**Executive Office of Health and Human Services**  
**Office of Medicaid**  
600 Washington Street  
Boston, MA 02111  
[www.mass.gov/masshealth](http://www.mass.gov/masshealth)



Eligibility Operations Memo 05-08  
July 1, 2005

TO: MassHealth Eligibility Operations Staff  
FROM: Russ Kulp, Director, MassHealth Operations  
RE: **Senior Medical Benefit Request (SMBR)**

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#### **Introduction**

As of July 18, 2005, eligibility determinations for community persons aged 65 years or older and persons of any age needing long-term-care services at home will be processed through the MassHealth MA21 eligibility system, instead of through PACES.

To support this initiative, MassHealth has developed a new application for the "traditional" population called the Senior Medical Benefit Request (SMBR). Although most of the information collected on the SMBR is similar to that gathered on the current MassHealth Application (MHA), the SMBR has been formatted to be used as a data entry document on MA21 using "traditional" eligibility rules. The SMBR will replace the MHA, which will become obsolete as of September 5, 2005.

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#### **SMBR Use**

The SMBR will be used for the following populations.

- Persons who are aged 65 or older and living at home.
- Persons who are eligible for MassHealth under certain programs (i.e., Kaileigh Mulligan, PACE, and Spousal Waivers) to get long-term-care services to live at home.
- A person who is a member of a married couple living with his or her spouse; **and**
  - both members of the couple are applying for MassHealth; **and**
  - there are no children under 19 years of age living in the household; **and**
  - one spouse is 65 years of age or older and the other spouse is under 65 years of age.

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**SMBR Use  
(cont.)**

- Persons of any age needing long-term-care services in a medical institution.

Note: The procedures explained in this memo do not affect the following persons.

- Persons who are applying for MassHealth Buy-In for Qualifying Individuals. These persons will continue to complete the MassHealth Buy-In application (MHBI-1).
- Persons aged 65 or older who are disabled and working at least 40 hours per month. These persons will continue to complete the Medical Benefit Request (MBR) for processing through the Central Processing Unit.

Although the new SMBR will also be used for persons needing long-term-care services in a medical institution, eligibility determinations for this population will continue to be processed through PACES as it is currently. At a later date, eligibility determinations for this population will be transferred to the MA21 eligibility system.

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**SMBR Changes**

The SMBR (orange form) contains the following changes.

- It is designed to match the data elements contained in the new MA21 eligibility screens.
  - The instruction page has been rewritten to assist applicants with choosing the SMBR or MBR, whichever is appropriate for them.
  - The SMBR is now used to determine eligibility for the Uncompensated Care Pool as well as MassHealth.
  - The "Previous Assistance" section has been changed to gather data for Pickle eligibility determinations on MA21.
  - The "Personal-Care-Attendant Services" section now has a lead question that if answered "no" will take the applicant to the next section (Income from Working).
  - The "Nonworking Income" section resembles more closely the same section on the MBR to capture needed information for an accurate determination on MA21.
  - The "Assets" section has been changed to match more closely the MA21 eligibility data entry screens that have been designed for all asset types.
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**SMBR Changes  
(cont.)**

- A new section has been added to capture information about long-term unemployment, disability, and HIV eligibility using Health Care Reform (HCR) rules on MA21 when a spouse under the age of 65 is in the household.
  - The signature page now includes references to the Uncompensated Care Pool.
  - The blue Long-Term-Care Supplement (LTC-SUPP) has been incorporated into the SMBR as a blue supplement: Supplement A: Long-Term-Care Questions.  
Note: The stand-alone LTC-SUPP will continue to be used in situations when a member is "transitioning" from a HCR community-based situation to a long-term-care medical institution.
  - The gold PCA Supplement and Form 4506 (IRS form to request previous tax returns) will continue to be stand-alone forms included in the application packet.
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**Supplies and  
Use of New and  
Old Forms**

Supplies of the SMBR will be available on July 1, 2005, and providers will be notified in Long-Term-Care Facility Bulletin 89 where to get supplies.

After September 5, 2005, the red MHAs will no longer be accepted at the MassHealth Enrollment Centers (MECs). If an MHA is received after September 5, 2005, applicants will be mailed the new SMBR along with their obsolete date-stamped MHA, and an Application Return Notice (MHA-RET (09/05)). To protect their previously received MHA application date, the applicant will be given 14 days from the date of the MHA-RET notice to return the completed SMBR. MEC staff must date stamp and copy the first page of the received MHA to keep in the applicant's file. If the SMBR is submitted to the MEC after 14 days of the date on the MHA-RET, the date the SMBR is returned to the MEC will be the SMBR application date.

A copy of the Application Return Notice (MHA-RET (09/05)) for each specific MEC is attached to this memo. Please print copies as needed.

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**MassHealth and  
You Guide**

The MassHealth and You Guide has been revised to reflect the SMBR changes and has five sections with a new section IV (Senior Care Options and Other Benefits) added. The revised Guide will be effective July 1, 2005, and will be packaged with the new SMBRs. It will also be available as a stand-alone publication.

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**Questions**

If you have any questions about this memo, please contact the MassHealth Policy Hotline through your MEC designee.

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Executive Office of Health and Human Services  
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**MassHealth Enrollment Center**  
300 Ocean Avenue  
Suite 4000  
Revere, MA 02151  
1-888-665-9993 (TTY: 1-888-665-9997 for  
people with partial or total hearing loss)

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/Zip: \_\_\_\_\_

### **Application Return Notice**

MassHealth is sending back your MassHealth Application (MHA) form, which you recently sent us. To apply for MassHealth, you must fill out an application called the Senior Medical Benefit Request (SMBR) – the enclosed orange form. Before you fill out the SMBR, please read the instructions on both sides of the cover to the application. If you send back the filled-out SMBR within 14 days of the date of this notice, we will use the application date of your original MHA to determine your eligibility.

If you send back the filled-out SMBR after 14 days of the date of this notice, MassHealth will use the date we get your filled-out SMBR as your application date. If you need help with old medical bills, make sure you fill out the section called "Previous Medical Bills" on page 1 of the SMBR.

Send back the filled-out application to the MassHealth Enrollment Center listed at the top of this notice.

If you have any questions about this notice, or need help filling out the Senior Medical Request Benefit form, call us at the toll-free telephone number at the top of this notice.

Thank you.

Community Integration Team



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**MassHealth Enrollment Center**  
333 Bridge Street  
Springfield, MA 01103  
1-888-665-9993 (TTY: 1-888-665-9997 for  
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Date: \_\_\_\_\_

Name: \_\_\_\_\_

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**MassHealth Enrollment Center**  
21 Spring Street  
Suite 4  
Taunton, MA 02780  
1-888-665-9993 (TTY: 1-888-665-9997 for  
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**MassHealth Enrollment Center**  
367 East Street  
Tewksbury, MA 01876  
1-888-665-9993 (TTY: 1-888-665-9997 for  
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